Deltek

Deltek Talent Management 16.3

Getting Started User Guide

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Contents

Getting Started User Overview

Become familiar with the terminology, icons, and toolbar options that you see throughout Talent Management. Since this guide covers all available modules and features, you may see references to features that your firm has not purchased.

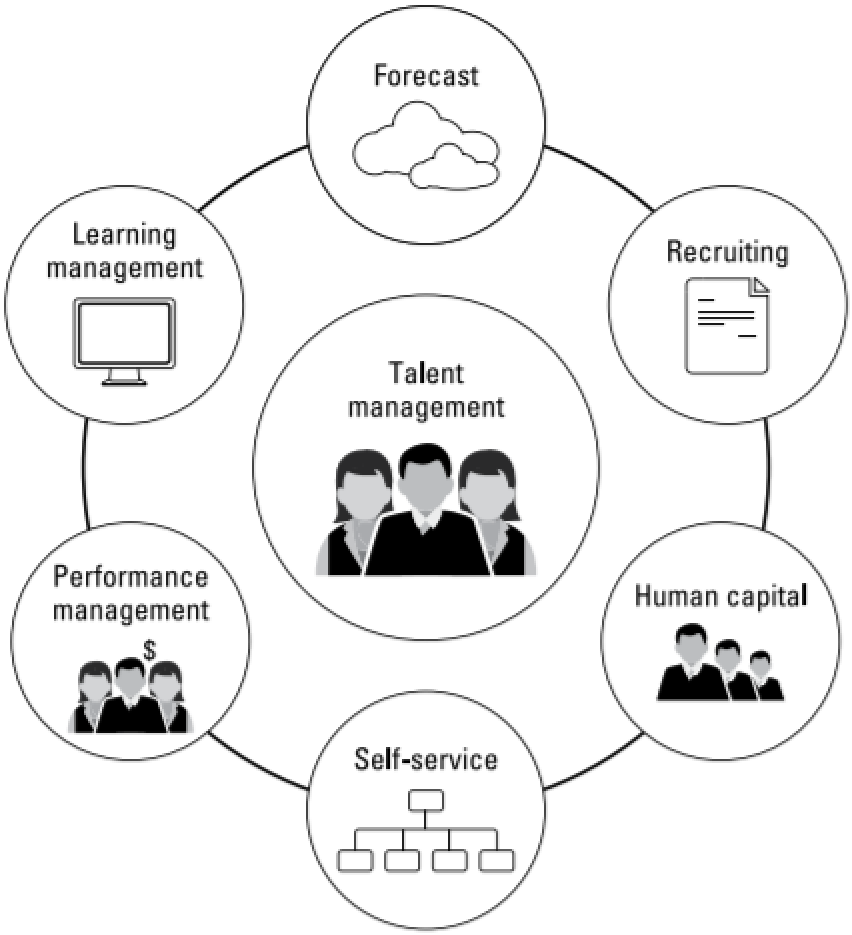
Welcome to Deltek Talent Management

Deltek Talent Management helps you improve the quality of new hires, increase employee engagement, and maintain compliance, all while giving you comprehensive visibility into the state of your workforce.

Deltek Talent Management Overview

In addition to recruiting and onboarding employees at top speed, you use project-focused performance management to supply your teams with feedback that increases success at the project level. To prepare your workforce for the future, create development plans and learning opportunities that engage and inspire your employees. Use Talent Management's streamlined approach to compensation management to make high-impact decisions in real time.

With a single, integrated solution for acquiring talent, managing people, and optimizing your workforce, Talent Management provides valuable insights that help you support firm-wide growth and make strategic personnel decisions.



Using the Deltek Talent Management Online Help

The help system provides the following types of topics:

Topic Type	Purpose
Procedures	Procedure topics provide step-by-step instructions for completing tasks.
Field Descriptions	Reference topics contain tables of field descriptions. These topics describe data entry requirements for each field and the effects of each option.
Concepts	Concept topics explain the underlying concepts that drive various business processes.
Overviews	Overview topics introduce an application, feature, or process.

Other Documentation

To access printed guides of the online help, by area, select **Guides** from the help menu, or see the What's New help topic. In addition, see the Learning Aids help topic to access available videos and click-thrus.

Help Feedback

With the release of 16.0, we moved our online help to a new format. We will continue to add and improve our content on a regular basis. We also make PDFs of the help available for download. Please use the feedback button located on the help screen to report documentation errors or to make suggestions for improving the documentation.

Access to Features Based on Role

The security roles that your system administrator sets up control access to forms, tabs, and fields. The role to which you are assigned determines which features you can access and defines which records you can view, add, or modify.

The help system describes all available forms, tabs, and fields, and explains how to perform all tasks related to those forms. However, restrictions defined for your security role might make some components of the user interface unavailable to you, and you may not be able to perform some of the procedures included in the help.

If you have questions about your access rights, contact your system administrator.

Terminology

If you are new to Talent Management, you may find it helpful to become familiar with the terms that are used throughout the application and documentation.

Terms	Description
Badge	A badge is a box of information about a user, including the user’s name, job title, hire date, work location, and profile photo. The dimensions and content of the badge vary based on where it is shown in the application.
Breadcrumbs	Use breadcrumbs as navigational aids, to keep track of your current location in the application.
Competency	Competency encompasses the demonstrable skills that an employee possesses, including abilities and behaviors as well as skills or specific knowledge.
Dynamic Forms	The forms are screens of fields and options that you complete as part of your organization’s recruiting process, such as a requisition, résumé profile, secondary application, interview, offer, or onboarding form.
Employee Referral	An employee referral is an applicant who was referred to your organization by an existing employee.

Terms	Description
External Front End	The external front end is the career portal that an external job seeker works with when applying to your organization. Your organization might have more than one external front end if it is necessary to show different branding for different divisions or for company entities.
Features	A feature is an aspect or attribute of the application that you can configure for a Group, to allow access to different functions.
Fields	Fields display on tabs and dialog boxes. Use fields to enter and update data for a record or transaction. Any display-only field, which you cannot modify, is displayed as shaded (grayed-out).
Hiring Order	A hiring order is a request that you submit to a recruiting agency for help in finding permanent or contract candidates for a position.
Job Family	You use job families to categorize Job Profiles. For example, you might use the "I.T." job family to identify Job Profiles that are technical in nature and which require similar job competencies and skills.
Navigation Pane	The Navigation pane, located on the left side of the screen, provides access to the modules and sub-screens that you use to complete work. When you click an option in the Navigation pane, it opens on the right side of the screen. To hide or display the Navigation Pane, click in the toolbar.
Onboarding	Onboarding refers to the process for bringing in a new hire, including sending documentation to them for review and completion. You can also alert existing employees about the new hire's arrival and prepare the new employee for what to expect when beginning the new job.
Passive Job Seeker	A passive job seeker is one who has submitted a résumé but has not applied to a specific requisition.
Pool	A pool is a user-defined collection of résumés with similar traits such as skill sets, job preferences, or education levels. You can also create pools to store résumés for future consideration.
Post Hire Modules	The post-hire modules address an employee's performance, career development, and learning. These modules are: ▪ **EPM**: Employee Performance Management ▪ **CDSP**: Career Development and Succession Planning ▪ **LMS**: Learning Management Solution

Terms	Description
Recruiting Team	Individuals on a recruiting team share information about requisitions, job seekers, and candidates. Typically you limit membership in a recruiting team to internal users in the Recruiter or Hiring Manager group.
Recruiting Workflow	In setting up a recruiting workflow, your administrator automates many functions of the recruiting process. A recruiting workflow might include form selections, user task suggestions, offer management, onboarding procedures, and more.
Screened-In	An applicant who has met or exceeded the minimum point value set in the Screening Questionnaire associated with the requisition to which they applied is considered "screened-in."
Screened-Out	An applicant who has not met the minimum point value set in the Screening Questionnaire associated with the requisition to which they applied is considered "screened-out,"
Tabs	Most application screens are organized in a tabular format. The tabs in an screen may contain fields or grids in which you enter or modify information.
Toolbar	The toolbar, located at the top right of the screen, provides access to options and actions that are essential but which you might not typically perform on a daily basis.
Total Talent Profile	The Total Talent Profile provides an employee with a single location in which to view all of their pertinent information. An employee can view and update appraisals, career paths, job history, mentoring relationships, project teams, succession plans, and training/development activities in this single area.
Widgets	You use widgets on the Main Dashboard to display information and actions that you use frequently.

Main User Interface Elements

If you are new to Talent Management, become acquainted with the elements of the user interface, such as the Navigation pane, dashboard, breadcrumbs, and sub-menus.

Navigation Pane

Use the Navigation Pane that displays on the left side of the screen to switch between the different areas or modules.

The Navigation Pane gives you access to the actions and options that you use on a daily basis. It is organized by module, such as Recruiting, Performance, Learning, and so on. When you select an option from the Navigation Pane, it expands to display the nested sub-menus that are available for that option.

Menu	Description
Dashboard	This is the Home screen, the first screen that you see when you log in. The dashboard displays alerts and widgets.
My Employees	Managers use this menu to access options for appraising and managing their direct and matrix reports.
Recruiting	This menu includes actions and options for recruiters, hiring managers, HR and administrators. Access screening questionnaires and letter templates from the toolbar.
Performance	Both managers and employees can use the options in this menu, which provides access to appraisal approvals, if applicable, as well as to the employee's own appraisal or 360.
Learning	Employees use options on this menu to perform learning-related tasks such as viewing their learning profiles, seeing classes in which they're enrolled, and searching for courses. Instructors can view the classes they are teaching.
Succession	This menu provides access to succession plans. You can also review the domino list to see which employees have potential successors and what the "domino effect" would be if an employee left their current position.
Career Center	From this menu, employees access all career-related options, such as résumés, job searches, referrals, and development plans. Any items that require attention, such as the completion of an application, are marked with the icon.
Reports	This menu lists available modules. From there, click an option to view all available reports for that module.
Custom Menu	The options on this menu are determined by your Administrator. These menu options can be frequently visited Web sites for employees (internal or external), or frequently visited Web site pages.

Display or Hide the Navigation Pane

You can hide or display the Navigation Pane at any time by toggling the appropriate icon.

To display or hide the navigation pane:

1. If the Navigation Pane is hidden, click to display it.

   As you click through the sub-menus, the pane remains open so that you can easily track your position in the user interface.
2. To collapse all open sub-menus in the pane, click **Main Menu**.
3. To hide the Navigation Pane at any time while it is displayed, click .

Main Dashboard

The Main Dashboard is the first screen that you see when you log on, and it contains three sections: Alerts, Widgets, and Tasks.

Alerts

The highlighted section displays any important actions or notifications sent to you. The alerts box displays only if you have any pending alerts. You will see a **Show More** link if you have three or more entries in your alerts box.

Click the alert link to display the screen on which you need to complete a task.

Click to dismiss the alerts box and add more screen space to view dashboard widgets. To toggle back and view your alerts once more, click the **Alerts** button again.

Widgets

Widgets are the tables and graphs of summary data that are displayed on the Dashboard. You can add widgets to the Dashboard and display them in any sequence. The widgets available to you are based on your role in the organization and the application features that your firm uses.

Tasks

Tasks are action items that employees must complete on or before a specific date. Users who are associated with a Task are referred to as "stakeholders."

As a stakeholder, you can have one of the following designations:

- **Assignee**: This is the person who is responsible for completing the task.
- **Principal**: This is the person who needs to ensure that the task is done.
- **Follower**: This is a person who has an interest in seeing the task finished, but is not responsible for completing it or for ensuring its completion.

Procedures for the Dashboard

On your dashboard you can add widgets or change the sequence in which they are displayed. You can also add new tasks and review or edit existing ones.

Add New Widgets

When you add a widget to the Dashboard, you select its type and determine its placement.

To add new widgets:

1. On the right side of the Main Dashboard line, click **Get More Widgets**.
2. On the Dashboard Widget Administration screen, select a widget from the **Select Widget from List** drop-down list.
3. If you want to see what the widget looks like, click **Preview Widget** to display it on the lower half of the screen.
4. To place the widget, click **Add to Left Side** or **Add to Right Side**.

If the widget has multiple columns and spans the width of the screen, **Add to Left Side** is the only option.

5. To add more widgets, repeat steps 2 through 4.
6. Return to the Main Dashboard to arrange the widgets:
   - To move a widget to another place on the Dashboard, place your cursor in the title area of the widget box. When the cursor turns into a four-sided arrow icon, click and drag the box to the new location.
   - To update an editable widget, click .
   - To remove a widget, click .

Add New Tasks

In creating a task, you specify its purpose, due date, who can see it, whether or not it is required, and who must complete it. You are automatically designated as the principal stakeholder.

To add tasks:

1. On the Main Dashboard, click **Tasks**.
2. On the My Tasks screen, click **Add Task**.
3. In **Description**, enter the purpose of the task.
   You can use standard formatting options for your text.
4. To specify the date by which the task must be completed, in **Due Date**, click and select the date.
5. If Assignees must complete the task, select **Is Required**.
6. If the task should be visible to stakeholders only, select **Is Private**.
7. To specify that the task is a group task, select **Is Group**.
   In the Stakeholders table, you are automatically listed as the **Principal** stakeholder and your Direct Reports are automatically added as **Assignees**.
8. If necessary, change the stakeholders for the task:
   - To add more employees as stakeholders, click **Add More Stakeholders**, use the Add More Stakeholders dialog box to search for and select those employees, and then confirm your selection to return to the My Tasks screen.
   - To remove a stakeholder, click in the **Actions** column.
9. Click **Save**.

View Tasks

You can review the details of a specific task, including history tracking information about any changes made to the task.

To view tasks:

1. On the Main Dashboard, click **Tasks**.
2. On the My Tasks screen, locate the task that you want to view.
3. In the **Actions** column, click **View**.

Edit Tasks

You can change the description, due date, required setting, and group setting for a task, as well as add or remove stakeholders.

To edit tasks:

1. On the Main Dashboard, click **Tasks**.
2. On the My Tasks screen, locate the task.
3. In the**Actions** column, click **Edit**.
4. In **Description**, you can update the purpose of the task or change the formatting.
5. To change the date by which the task must be completed, click in **Due Date** and select a new date.
6. To change the task's required status, select or clear the **Is Required** option.
7. To change the task's visibility, select or clear the **Is Private** option.
   If a task is private, it is only visible to stakeholders.
8. To change the group task setting, select or clear the **Is Group** option.
   In the Stakeholders table, you are automatically listed as the **Principal** stakeholder and your Direct Reports are automatically added as **Assignees**.
9. If necessary, change the stakeholders for the task:
   - To add more employees as stakeholders, click **Add More Stakeholders**, use the Add More Stakeholders dialog box to search for and select those employees, and then confirm your selection to return to the My Tasks screen.
   - To remove a stakeholder, click in the **Actions** column.
10. Click **Save**.

Elements on the Dashboard

Review descriptions of the fields, icons, and options related to widgets and tasks.

Widgets

Widgets are tables and graphs of summary data displayed on the Dashboard. You can add widgets to the Dashboard and arrange them as desired.

The following table lists all of the widgets that are available for the Dashboard. The widgets available to you might vary, based on your security role and on the features and modules that your administrator has enabled.

Core

Field	Description
Mini-Calendar	This displays the current month and highlights any days for which you have scheduled events. Click a hyperlinked day to view that date in the main Calendar.

Recruiting

Field	Description
Activity Since Last Login	This lists a variety of activities that have taken place since the last time you logged in. Clicking the hyperlinked number takes you to the management page for that section. ■ **# of New Résumés Submissions to My Requisitions**: This number indicates how many résumés were submitted in response to your requisitions. ■ **# of New Passive Résumés Created**: This number indicates how many résumés were entered in the application but not yet submitted to any requisitions. ■ **# of Interview Invitation Responses**: This number indicates how many responses you received from candidates to whom you sent an interview request. ■ **Offers Accepted/Rejected by Candidates**: This number indicates how many of your offers have elicited candidate responses (including both acceptances and rejections). ■ **Requisitions Approved/Rejected**: This number indicates how many requisitions were approved or rejected.
Candidates by Source	This displays the number of candidates in real time and is grouped according to their referral source. By default, this widget displays data for the last 30 days, but you can click **Change Settings** to edit the date range. Click a pie section to view the candidates from a specific referral source.
Candidates by Status	This displays the number of candidates in real time and is grouped according to their current status, such as **Phone Screen**, **1st Interview**, **Offers Extended**, and so on. By default, this widget displays data for the

Field	Description
	last 30 days, but you can click **Change Settings** to edit the date range. Click a pie section to view the candidates that share a specific status.
E-Verify Case Alerts	This widget is designed to bring your attention to cases that need your action. This is available only if the E-Verify Integration feature is enabled. ▪ **Open Cases to be Closed**: This indicates the number of cases that are ready to be closed but are still pending. ▪ **Cases with New Updates**: This indicates the number of cases that had a change in case result. These updates come directly from E-Verify and are sent back to the system.
My Activity	This displays the count in real time for each action in the selected date range. By default, this widget displays all the data for each activity type. Click the hyperlinked number to go to the management page for that section.
My ATS Averages (last 30 days)	This displays the average count in number of days for the following recruiting activities: ▪ **Days to Fill a Requisition** ▪ **Days to Hire** ▪ **Screened In Rate** ▪ **Screened Out Rate**
My Candidates	This displays the most recent candidates for your requisitions. The information is shown in chronological order, based on the last status change date.
My New Résumé Submissions	This displays the most recent résumés for your requisitions. The information is shown in chronological order, based on the résumé application date.
My New Résumés/CVs and Candidate Pipeline	This provides a cumulative view of all submitted résumés and the candidates associated with requisitions that have been created from a particular Job Profile. Click the hyperlinked number to view the listing. This is available only if the Hourly Module is enabled.
Offboarded Employees	This displays any offboarded employees with pending tasks that need to be reassigned. Click an employee name to display related data on the Reassign Pending Items screen.
Onboarding Status	This provides a quick overview of the Onboarding status of new hires. It can also display new hires that have not yet had onboarding tasks initiated for them.
Onboarding Tasks	This displays the onboarding tasks that require your action.

Field	Description
Quick Job Posting Widget	This give you a quick way to post jobs. If information, such as **Job Type**, has been specified in the Job Profile, then that selection displays as a read-only field and cannot be changed. If there are additional required fields on the requisition form, then a modal window displays after you click **Post a Job Opening**, allowing you to complete the required fields. This is available only if the Hourly Module is enabled.
Recent Requisitions	This displays the requisitions assigned to you and indicates the number of newly-submitted résumés as well as the candidates currently attached to the requisitions.
Résumé E-mail Reader Instructions	This displays instructions about how to upload résumés by e-mail.
Requisitions by Status	This displays the number of requisitions in real time and is grouped according to their current Status, such as **Pending Approval**, **Open**, **Filled**, and so on. By default, this widget displays data for the last 30 days, but you can click **Change Settings** to edit the date range. Click a chart section to view the requisitions for a specific status.
Search Requisitions	This allows you to use keywords to search for requisitions according to **Requisition Number**, **Job Title**, and/or **Description**.
Search Candidates	This allows you to search for a candidate by **Candidate Name** or **E-mail**.
Search Résumés	This allows you to perform a quick search for résumés using **Keywords**, **First Name**, **Last Name**, and/or **E-mail**. If your company has the OFCCP compliance feature enabled, then you are prompted to select a requisition before performing a quick search.

Performance

Field	Description
Active Appraisals	This gives managers quick access to any active appraisals or 360 reviews in progress for their direct reports. If the appraisal is on a schedule, the **Phase End Date** displays in the widget. Click the appraisal name to display the appraisal.
Continuous Feedback	This displays the sessions that you have created for your direct reports as well as the sessions created for you by your manager.
Goal Completion for Team	This allows managers to track the progress of their employees' performance goals. You can expand each employee's section to view goal details. From there, you can see whether goals have not been set, as well as check the progress status information such as **Start Date**, **Target Date**

Field	Description
	and **Current Status**. Click the appraisal name to display the employee's Goals page in the appraisal.
Goal Completion Status	The shows the progress of each goal. You can expand this to display additional details such as **Start Date**, **Target Date**, **Progress**, and **Current Status**.
New Pending Appraisals	This lists the manager's direct reports and other employees with appraisals ready to be scored. Click the name to view the appraisal.
Phase Overview	This displays the percentage of a manager's direct employees in each phase of their primary appraisal. Click the pie chart to access the My Employees screen, on which you manage the employee appraisals.
Search Employees	This widget makes the **Employees** option available in the Quick Search sub-menu.

Learning

Field	Description
Classes Just Added	This displays the 10 most recently added classes and their corresponding **Start Date** and **End Date**.
Completed Class Assignments and Tests	This displays the number of Assignments and Tests in a class. Click the number to access the details.
Employee Monthly Class Participation Statistics	This displays your direct reports who have completed a class, or are enrolled in a class, during the current month. The default view is five direct reports, but you can click **Change Settings** to increase the view.
Enrollment Statistics	This is available to class instructors if the class **Status** is **Open** or **Registering**. For each class, you see the number of enrolled students, the maximum and minimum number of students for the class, and the remaining open slots for the class.
My Curriculum Completion Status	This graph shows the percentage of curriculum completion per employee enrolled and approved in each curriculum.
New Skills Added	This lists the new skills your employees have added and which are awaiting your approval.
Pending Certificates	This lists the certificates that are ready to be granted to employees. Click the number to take that action.
Search Classes	This allows you to search for classes. Enter all or part of a class name to find a match.

Field	Description
Top Courses by Enrollment	This graph shows the courses with the highest number of currently enrolled students. The default view lists five courses, but you can click **Change Settings** to increase the view.

Development

Field	Description
9 Box	This allows you to quickly assess your team's performance and potential via the dashboard. Click through to view the details of the employees in each segment.
Career Path Progress	This bar chart shows where you are in your Career Path. For example, if you have 4 jobs listed to get to your ultimate job, and you are in the third job, your path progress is at 75%.
Competency Fit	This compares the required competencies for the job against those held by the employee. Click the icon to launch a polar graph that helps you identify how closely the employee fits the requirements.
Development Plan Completion Status	This bar chart shows the completion percentage of your Personal Development Plan. Click the bar to access the profile of your development plan. There are no filter options for this widget, but it is available to any employee.
Development Progress	This allows managers to track the Development Plan progress of their direct reports.
Employees with Active Career Paths	This chart shows the percentage of a manager's direct reports with an active career path. Click the chart to launch the My Employees screen.
My Plans with Successors	This percentage chart shows your Succession Plans list, including both those plans with potential replacements and those without. Click the chart to view information on the My Succession Plans screen.
New Skills and Competencies	This allows managers to view the names of their direct reports who have added skills or competencies to their profile. The skills and competencies listed here require manager endorsement or approval before you can add them to the employee's Total Talent Profile.
Top Career Paths	This table lists the most popular active career paths and shows the number of employees on the path displayed.

My Tasks Screen

This screen displays all the tasks associated with your user record, whether your role is as Assignee, Principal, or Follower, and includes all the information about the items that require action, when they need to be completed, and by whom.

Display the My Tasks Screen

You display the screen from the Main Dashboard.

To display the My Tasks screen:

Click **Dashboard** » **Tasks**.

Contents of the My Tasks Screen

This screen allows you to view, assign, and resolve tasks or action items that require completion on or before a specified date. Use the Actions to manage and update tasks.

Columns in the Tasks Table

The My Tasks screen displays the following columns in a grid.

Field	Description
Description	This column provides a description of the task.
Required	This column indicates whether or not task Assignees are required to complete the task.
Category	This column identifies whether a task is **Personal** or is a **Learning Requirement**. ▪ **Personal**: This is a task that has no Assignee and only one Principal stakeholder. ▪ **Learning Requirement**: This is a task that is generated via the **Learning** » **Learning Requirements** screen. This displays if you are assigned a Learning Requirement task.
Due Date	This column displays the date by which the task must be completed.
Date Created	This column displays the date on which the task was created.
Role	Users associated with a Task are referred to as "stakeholders." As a stakeholder, you are designated as having one of the following roles in this column: ▪ **Assignee**: You are the individual responsible for completing the task. ▪ **Principal**: You are the individual who needs to ensure that the task is completed. (This is the default role for the person who creates the task.)

Field	Description
	▪ **Follower**: You have an interest in seeing the task finished, but you are not responsible for completing it.
Principals	This column lists the individuals who need to ensure that the task is completed.
Assignees	This column lists the individuals responsible for completing the task.
Status	This column indicates whether the task is **Complete**, **Incomplete**, or **Canceled**.
Actions	This column displays the actions that can be taken for each task.

Actions

Use options on the My Tasks screen to perform the following actions.

Field	Description
View	Click this option to view the task details.
History	Click this option to view the changes made to the task.
Edit	Click this option to change the task details. This displays only if you are the Principal stakeholder.
Mute Reminders	Click this option if you do not want to receive reminder notifications for the task. This displays only if you are the Principal or the Follower stakeholder. Assignees cannot mute task reminders.
Follow	Click this option to add your name as a Follower stakeholder.
Un-Follow	If you are a Follower stakeholder, click this option to remove your name as a Follower.
Complete	If the current status is **Incomplete** or **Canceled**, click this option to change the **Status** to **Complete**.
Un-Complete	If the current status is **Complete**, click this option to change the **Status** to **Incomplete**.
Cancel	If the current status is **Incomplete** or **Complete**, click this option to change the **Status** to **Canceled**.
Un-Cancel	If the current status is **Canceled**, click this option to change the **Status** to **Incomplete**.

Toolbar

Use the main toolbar options to perform actions global actions, such as viewing online help, reviewing action items, specifying your personal settings, or logging off.

Icon	Action	Description
English	**Language**	Select the language that you would like to use.
	Calendar	Click this icon to access your calendar or scheduled events. The number on the calendar icon indicates how many events you have scheduled for the current day, as well as for future dates.
	Libraries	Click this icon to access the Screening Questionnaires, Documents, Letter Templates, and Learning Library (if you are using the Learning Management System).
	Help Resources	Click this icon to view the quick help for the current page. You can also link to the Video Library, FAQs, and Guides.
	Administration	Click this icon to access the Administration screen, which lists all Administration options. This icon only displays if you have Administration privileges.
	Your Account	Click this icon for access to your Total Talent Profile, Notifications, Account Information, Personalization, and the Org Chart. You can also log out of Talent Management from here.

Sub-Menu

This area holds shortcuts you can use to search, view recent items, or pin an item to keep it displayed while you use the application.

Item	Description
Search	Use the search function to do a quick search of employees, jobs, requisitions, resumes, candidates, mentors, or courses. Enter a name or keyword for which to search and then press ENTER or click .
Recently Viewed	Click to see a listing of your recent history in Talent Management. Click an item to return to that location.
Pins	Click to view, add, or manage your pins. Pins are shortcuts to your favorite or frequently used screens and functions. Click any displayed pin to quickly go to that screen.

Breadcrumbs

The breadcrumbs that display below the Toolbar and the Sub-Menu show you the path that you took through the application to reach your current location. In other words, the breadcrumbs concatenate the menu options that you selected to get to the current screen.

Instructional Videos

This icon displays on the upper-right corner of the screen if an instructional video is available for the current page.

Click the icon to watch the video. You must have a recent version of Adobe Flash Player to view videos.

Calendar

On the Main calendar, which you can access via the toolbar at any time, you add or export events, review a list of pending interviews, and share (or un-share) your calendar.

The Calendar screen presents detailed information for the current week. You can change the display to view events by day, month, or year.
You can also add a Mini-Calendar widget to your dashboard.

Procedures for the Calendar

In addition to adding new calendar events, you can share or un-share calendars, review a list of pending interviews, or export events to Outlook or to other calendars, such as Google.

Add a New Calendar Event

You can add events to your calendar at any time.

To add a new event to your calendar:

1. On the Talent Management toolbar, click the **Calendar** icon and then click **My Calendar**.
2. On the Add Event tab of the My Calendar screen, in the **Event Name** field, enter a descriptive title for the event.
3. If the event has taken place or the task is completed, select the **Completed** option.
4. To specify the event classification, set the **Type** option to **Event**, **Task**, **Reminder**, or **Interview**.
5. If the event is an interview, set the corresponding **Interview Type** option to provide additional information about it:

Option	Description
Single Event	Select this option to schedule a traditional interview for a single candidate and specify the interview's duration.
Scheduled Slots	Select this option to schedule multiple interviews within a span of time, using designated time slots. When a candidate selects a time slot, that slot is no longer available to others. Event duration and slot length determine the number of slots. For example, if the event is scheduled for 03:00pm to 05:00pm and the slot length is 30 minutes, the interview recipients can select from four slots. When you select this interview type, additional fields display: ▪ **Slot Length**: Select the duration for each slot. ▪ **Claimed Slots**: This field displays the number of interview slots claimed so far. ▪ **Available Slots**: This field displays the number of interview slots remaining.
Group Event	Select this option to allow multiple candidates to interview at any time during a window of time that you specify.

6. Specify the date, start time, and end time for the event using the **Date**, **To**, and **From** options.
7. To add another date for the same event, click ➕ **Add Another Date**.
8. If you color code events, click in the **Event Color Code** field to select a color or enter a color code.
9. In the **Location** field, enter the location of the event.
10. To specify the type of notifications received by anyone sharing the event, use the **Notification** field to specify one of the following:

Option	Description
None	No reminders are sent for the event.
Email	An email reminder is sent.
Pop Up Window (if on site)	A reminder displays when you log on.

11. If you want to keep the event private so that it is not visible to others, even on a shared calendar, select the **Keep Event Private** option.
12. In **Event Description**, enter information about the event's purpose.
13. Use the options in the **Attachments** section to make available any documents related to the event.

You can share attachments with a team or with individual users, who you specify.

14. Use the options in the **Upload a Document** section to upload additional files to Talent Management, make them available as attachments, and specify who can access the files.
15. Click **Save**.

Share Calendars

You may have the option to share calendars with other employees.

- To share your calendar with other employees, click » **Personalization** and on the Personalize System Settings screen set the **Share Calendar** option to **Yes**.
- To add other employees' calendars to your own, click **Select Employees** in the **Add Calendar For** section of the My Calendar screen.

  Events for the selected employees appear in your calendar, color-coded to indicate the person to whom they belong. Click to change the color associated with an employee.

  If you cannot find the person you seek, that person hasn't shared his or her calendar.

Unshare Calendar Events

If you are currently sharing your calendar, you can unshare it.

To unshare your Calendar events:

1. On the toolbar, click » **Personalization**.
2. On the Personalize System Settings screen, in the **Calendar** section, set the **Share Calendar** option to **No**.

Export Calendar Events

You can export events to Google, Outlook, Yahoo, or any calendar application that makes use of the .ics format

Yahoo and Google calendars do not automatically synchronize with Talent Management if you modify or unshare a Calendar event after you export it. To reflect event changes in Yahoo and Google calendars, you must repeat the calendar event export steps.

Microsoft Outlook, however, supports automatic update of changed or unshared Calendar events.

To export calendar events:

1. On the Talent Management toolbar, click the **Calendar** icon 0 and then click **My Calendar**.
2. On the My Calendar screen, click **Export Calendar** and then select one of the following options:

Option	Description
My Event(s)	Select this option to include only those calendar events that you own.
All Events	Select this option to include all events in your calendar, no matter who owns them.

3. In the Event Export window, copy the provided link.

   You will need to paste this URL into the external calendars, as described in the related instructions.

4. Click **Close Window**.

Export Calendar Events to Google Calendar

You can export events from Talent Management to your Google calendar.

The Google calendar does not automatically synchronize with Talent Management if you modify or unshare a Calendar event after you export it. To reflect event changes in the Google calendar, you must repeat the calendar event export steps.

To export events to your Google calendar:

1. On your Google Calendar page in your browser, locate the navigation pane on the left and click the **+** icon beside **Add a Friend's Calendar**.
2. Click **From URL**.
3. In the **URL of calendar** field, paste the URL that you copied from the Event Export window.
4. Click **Add Calendar**.
5. Change the calendar settings as necessary by clicking the newly-imported calendar in the **Settings for Calendar** section of the navigation pane.

Export Calendar Events to Yahoo Calendar

You can export events from Talent Management to your Yahoo calendar.

The Yahoo calendar does not automatically synchronize with Talent Management if you modify or unshare a Calendar event after you export it. To reflect event changes in the Yahoo calendar, you must repeat the calendar event export steps.

To export events to your Yahoo calendar:

1. On your Yahoo calendar in your browser, in the navigation pane on the left, click the **Gear** icon next to **Others**
2. Click **Follow Other Calendars**.
3. In the New Calendar pop-up window, enter a name for the calendar event.

4. In the **iCal Address** field, paste the URL that you copied from the Event Export window.
5. Click **Continue**.

Export Calendar Events to Outlook

You can export your events to Outlook and then display them alongside your other Outlook schedules and events.

Microsoft Outlook automatically synchronizes with calendar events in Talent Management.

To export calendar events to Outlook:

1. In Outlook, on the Home tab, click **Open Calendar**.
2. Click **From Internet**.
3. On the New Internet Calendar Subscription window, paste into the **Enter the location of the internet calendar you want to add to Outlook** field the URL that you copied from the Event Export window.
4. Click **OK**.
5. When prompted to decide whether or not you want to add the Internet Calendar to Outlook, click **Yes**.

Review Pending Interviews

You can review pending interviews from the Calendar.

To review pending interviews from the calendar:

1. On the Talent Management toolbar, click the **Calendar** icon 

and then click **My Calendar**.
2. On the Pending Interviews tab of the My Calendar screen, use the **Event Name** option to select a pending interview.
   For each candidate who accepted the interview invitation, the candidate's name, the requisition identifier, and date of the invitation are displayed in a table below the option.
3. To see more information about a candidate, click that candidate's name.
   The candidate's profile is displayed on the Résumé Dashboard, where you can view their résumé and see any information already on file for the candidate.
4. To return to the Calendar, click **Calendar** in the breadcrumb trail at the top left of the screen.

Screens for the Calendar

In addition to the main Calendar screen, you can place a Mini Calendar widget on your Dashboard.

My Calendar Screen

The My Calendar screen is the main calendar application that holds your upcoming events, appointments, reminders, and training schedules.

Display the My Calendar Screen

You display the My Calendar screen from the Talent Management toolbar or via the Mini Calendar widget.

To access My Calendar:

Select one of two actions:

- On the Talent Management toolbar, click the **Calendar** icon  and then click **My Calendar**.
- Click any date in the Mini Calendar widget.

Contents of the My Calendar Screen

Use this screen to add events, share or unshare calendars, export events to third-party applications such as Google calendars, or review at-a-glance information about upcoming interviews.

The days with events are highlighted, including all manually created and auto-generated events, from any module.

My Calendar Tabs

The screen contains the following tabs.

Tab	Description
Year	This tab displays your events for the current calendar year. The counter next to each month indicates the number of activities that you have for that month. Click the counter to expand the view and display the list of events. From there, click the event title to view the details.
Month	This tab displays your events for the current month. The days on which you have an event show the name and time of the event. Click the day to expand the view and display the list of events for that day. From there, click the event title to view the details.
Week	This tab displays your events for the current week. The days on which you have an event show the name and time of the event. Click the event title to view the details.
Day	This tab displays your events for the day and highlights the hours that contain events.

Tab	Description
Add Event	This tab allows you to easily create an event or reminder. For more information on how to add events, see Add a New Event.
Pending Interviews	This tab displays events relating to interviews and steps in the screening process for job applicants.

Quick Access Tools

Use the quick access tools on the right side of the My Calendar screen to navigate your calendar more quickly.

- **Add Calendar For**: This allows you to manage your calendar sharing options.
- **Go To Date**: This allows you to easily jump to a specific date and view your appointments.

Mini Calendar

The Mini Calendar is a widget that you can place on your Dashboard. It displays the current month, highlighting days on which you have events scheduled.

This includes all manually created and auto-generated events, regardless of the module in which they were created. Click any date in the calendar to view your calendar events for that date.

Display the Mini Calendar Widget

You display the Mini Calendar from a widget on the Main Dashboard.

You must first add the Mini Calendar widget to your Main Dashboard.

To access the mini calendar widget:

On your Main Dashboard, click .

Your Account

Use Your Account to access your Total Talent Profile, review notifications and correspondence sent to you, account information, personalize your screen, update account information (including your password), and review your company’s organizational chart.

Total Talent Profile

The Total Talent Profile provides you with a single place to view details about your professional growth and development within the company. The options and tabs that you can view or edit depend on whether your company has licensed the Core HR module and on your permissions.

You access your own profile on the Your Account menu, located in the upper right of the screen.

Managers and administrators with the proper permissions can view other users' profiles, and edit certain fields. Managers access a direct report's Total Talent Profile on the My Employees screen.

Administrators configure which sections of the Total Talent Profile each user group can view, based on the group to which the logged-in user belongs, and the relationship to the user whose profile is being viewed.

If you belong to multiple groups, there is a hierarchy, from Employee at the bottom of the permission pyramid to the Administrator at the top. If you belong to the Administrator group, for example, the view and access rights of this group override the view and access rights for all other groups to which you belong. The one exception is that when you view your own profile, your access rights are limited to those defined for the Employee group.

Display the Total Talent Profile

How you display the Total Talent Profile depends on whether you are opening a profile for yourself, a direct report, or another user.

Select the appropriate action:

To open this Profile	Complete these steps
Your own	Click **Your Account** » **Total Talent Profile**.
A direct report's	Click **My Employees** » **My Employees** and then, on the Employees screen, click **Actions** » **view TTP** for the employee whose profile you want to display.
Another user's	On any screen with a clickable user name link, for example the **Team Owner** column on the My Project Teams screen, click the link.

Edit the Total Talent Profile

You may have access to edit details on your profile's Preferences tab, and if your organization uses Core HR, Core HR administrators can configure additional sections of the Total Talent Profile that managers can edit for their direct reports, and that employees can edit for their own profiles.

There are several ways to edit details on the Total Talent Profile:

- **Preferences Tab**: If you have access to the Preferences tab, you can edit details on this tab including details about location preferences, relocation options and job details such as travel availability. Managers cannot edit your preferences.
- **As an Employee**: If your organization uses Core HR, Core HR administrators can grant access to edit certain sections of the Employee Summary Pane, Employment Details tab, and Personal & Contact Information tab, such as Contact Information. An edit icon displays next to all editable fields.

  Click the edit icon and make changes. Changes are saved automatically. Depending on how Employee editing has been configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

- **As a Manager**: If your organization uses Core HR, Core HR administrators can grant access to edit certain sections of the Employee Summary Pane, Employment Details tab, and Personal & Contact Information tab of your direct reports' Total Talent Profiles. You access your reports' profiles on the My Employees tab. An edit icon displays next to all editable fields on the Total Talent Profile.

  Click the edit icon and make changes. Changes are saved automatically. Depending on how Manager editing has been configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

Edit The Preferences Tab

You may have access to edit details on your profile's Preferences tab.

To edit details on the Preferences tab of your profile:

1. Click **Your Account** » **Total Talent Profile**
2. Click the Preferences Tab.
3. Click **Actions** » Edit .
4. Make changes in the editable fields.
5. Click **Save**.

Edit Total Talent Profile Details as an Employee

If a Core HR Administrator has granted edit access to the Total Talent Profile, Employees can edit the sections to which they've been granted access.

A Core HR Administrator grants edit access and configures which sections of the Total Talent Profile are editable by Employees in **Administration** » **Core HR** » **Self-Service**.
In addition, an Employee must belong to a group with View access for the appropriate sections (such as View Contact Information) on the Total Talent Profile. This access is specified in **Administration** » **Features** » **Select a Group field** » **Core HR** » **Total Talent Profile**.

To edit your own Total Talent Profile:

1. Click Your Account name in the upper right of the toolbar.
2. Click **Total Talent Profile**.
3. For any field that displays an **Edit** icon , click the icon to change the value for that field.

   Editable fields depend on the configuration options selected by a Core HR Administrator, and may include fields on the Employee Summary Pane, the Personal & Contact Details tab or the Employment Details tab. Depending on how editing rights are configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

Edit Total Talent Profile Details as a Manager

If a Core HR administrator has granted edit access to the Total Talent Profile, Managers can edit the sections to which they've been granted access.

A Core HR Administrator grants edit access and configures which sections of the Total Talent Profile are editable by Managers in **Administration** » **Core HR** » **Self-Service**.

In addition, the Manager must belong to a group with View access for the appropriate sections (such as View Contact Information, View Personal Information, or View Vet, Citizenship and Passport Information) on the Total Talent Profile. This access is specified in **Administration** » **Features** » **Select a Group field** » **Core HR** » **Total Talent Profile**.

To edit the Total Talent Profile as a Manager for a direct report:

1. Click **My Employees** » **My Employees**.
2. Click the Development tab, if necessary.
3. Click **Actions** » **View TTP** for the employee whose profile you want to edit.
4. Editable fields display an **Edit** icon . Click the icon to change the value for that field.

   Editable fields depend on configuration options selected by a Core HR Administrator, and may include fields on the Employee Summary Pane, the Personal & Contact Details tab or the Employment Details tab. Depending on how Edit access is configured, certain parties may receive notifications when changes are made and approvals may be required before changes are final.

Edit the Employee Name

Users with appropriate permissions can edit an employee’s first, middle, and last name.

If an administrator grants the right to Edit Personal Information, you can edit your own employee name, or the employee name of other employees, such as direct reports. To grant members of the Employees or Managers groups access to edit this field, the Administrator completes additional steps on the Self-Service Administration screen. An **Edit** icon is displayed next to the employee’s name if the field is editable.

To edit the employee name:

1. On the Total Talent Profile, click the **Edit** icon .
2. Edit the first, middle, and last name, as needed.
3. Click **Save**.

Employee Summary Pane

View overall information for the selected employee, such as employment status and user login name. The options that you see depend on your permissions and whether or not your company has licensed the Core HR module.

Contents

The Employee Summary Pane is the area to the left of the profile, with the photo at the top. If the Core HR module is in use, some fields have effective dating functionality that allows you to view history. Click the History icon to view history data such as the effective date for the change, the old and new values, and the reason for the change.

Field	Description
Name	The employee name displays across the top of the page, with a date that indicates when the profile was last modified. An **Edit** icon displays if you have permission to edit the employee name.
Photo	An employee or their manager can add or change the profile photo by hovering over the photo or placeholder and clicking **Upload Image**.
View Résumé	Click to view the employee's résumé in the Résumé Dashboard.
Employee Number	The employee number is a unique numeric identifier.
User Login	This is the username used to log in to Deltek Talent Management.
Status	The value in this field indicates of the employment status. This value is based on the Original Hire Date, Rehire Date, or Termination Date. This field displays **Active** if the current date is between an employee's original Hire Date (or Rehire Date) and Termination Date.
Job Title	This field displays the employee's title. Hover over the name to view details. Click the job title to view details on the Job Profile page. If an Edit icon displays, click to display the Job Title dialog, where administrators can edit job related details, including Job Title, Effective Date, Annual Rate, Manager, and more.
Home Company	This field displays the employee's Home Company, at the top level of the organization structure.
Your Organization	This field displays the employee's Organization unit.
Location	This field displays the office location to which the employee is assigned.
Manager	This field displays the name of the manager to whom you report.
Exemption Type	This field displays the tax exempt status, such as Exempt or Non-Exempt.

Field	Description
Original Date of Hire	This is the date on which you were hired at the company. This displays only if you have not licensed the Core HR Module.
Start Date (Current Position)	This the date on which you started at your current position (title). This displays only if you have not licensed the Core HR Module.
Hire Date (Current Position)	This is the date on which you were hired at your current position. This displays only if you have not licensed the Core HR Module.

Update Your Profile Photo

You can update your Total Talent Profile photo at any time.

To update your photo:

1. On your Total Talent Profile, below the photo, click **Upload Image**.
2. In the User Photo dialog box, click **Browse**, select the new photo, and click **Submit**.
3. Crop the photo as necessary.
4. Click **Save** to upload the photo.

Edit the Employee Name

Users with appropriate permissions can edit an employee's first, middle, and last name.

If an administrator grants the right to Edit Personal Information, you can edit your own employee name, or the employee name of other employees, such as direct reports. To grant members of the Employees or Managers groups access to edit this field, the Administrator completes additional steps on the Self-Service Administration screen. An **Edit** icon is displayed next to the employee's name if the field is editable.

To edit the employee name:

1. On the Total Talent Profile, click the **Edit** icon .
2. Edit the first, middle, and last name, as needed.
3. Click **Save**.

Overview Tab

If the Overview tab is enabled for you, view a comprehensive summary of an employee from appraisal details to training and development information.

Contents

Sections on the Overview Tab include the following:

- Appraisals
- Career Path
- Competencies and Skills
- Job History
- Mentoring
- Project Teams
- Succession Plans
- Training and Development

Manage Appraisals

The Appraisals section of the Overview tab lists, and provides links to, your current, pending, and past appraisals.

To see appraisals:

1. To view the complete text of the appraisal, click the appraisal name.
2. To print the appraisal, click » **Print Appraisal**.

Manage Career Path Details

The Career Path section of the Total Talent Profile Overview tab displays any Career Paths that your manager created for you. You can have more than one career path, but only one career path is active at a time.

To view a career path on the Total Talent Profile Overview tab:

1. Click the job title to see the details of that career path.
2. Click **View Details** to view details for each position in the career path.
3. Click to access the following additional options:

Icon	Action	Description
	Add to Career Path	Select this option to add a new career path.
	Add to Development Plan	Select this option to add a new development plan.
	View Gap Analysis for Ultimate Job	Select this option to view the gap between your current position and the ultimate goal in the career path. The gap analysis is a comparison of your skills and competencies with those required by the ultimate job. The analysis is incomplete if either

Icon	Action	Description
		you or the job does not have associated skills or competencies.
	**View Pending Career Path Jobs**	Select this option to view all the jobs that exist for this career path.

Competencies & Skills Panel

The Competencies and Skills section of the Total Talent Profile Overview tab lists your competencies and skills.

Information comes from these sources:

- If you were hired via Talent Management and entered any skills or competencies as part of the application process
- If you entered skills or competencies into Talent Management after you were hired and your manager approved them
- If a manager or administrator added skills or competencies on your behalf.

> **Note:** To add competencies and/or skills to another employee's TTP, a user's group must have access to the **Manage Employee Competencies** and/or **Manage Employee Skills** feature(s). These features must first be enabled for the Global group, then for any specific user group (for example Mangers, or Administrators). To enable these features, on the Features screen (**Administration » Global Settings » System Administration » Features**), Expand **Core** and click one or more of these sub-features: **Manage Employee Competencies**, **Skills » Manage Employee Skill**.

Competencies

This section displays the competencies you've achieved to date. The following information displays.

Field	Description
Manage Competencies	Click to display the Competency Profile screen. From there you can remove a competency.
COMPETENCY NAME	This is the name of the competency.
CATEGORY	This is the type of the competency: Core or Job.
SOURCE	This is the way in which the competency was added to Deltek Talent Management. (For example, **Self** displays if the employee added the competency.)
SCORE	This is the rating for the competency:

Field	Description
	■ 1: Seldom Meets Expectations ■ 2: Meets Most Expectations ■ 3: Meets All Expectations ■ 4: Exceeds Expectations ■ 5: Greatly Exceeds Expectations The number of the score displays as a fraction over the total score possible. (For example, a score of 3 is displayed as 3/5.)
APPROVED DATE	This is the date on which the competency was approved. If your manager has not yet approved it, **Awaiting Approval** displays.
DETAILS	These are the details surrounding this competency.
ACTIONS	Click to edit the selected competency. The Competency Profile displays.

Skills

This section displays the skills you've achieved to date. The following information displays.

Field	Description
MANAGE SKILLS	Click to view the Skills Profile screen. From there you can edit or delete any of your skills.
SKILL NAME	This is the title of the skill.
SKILL CATEGORY	This is the group to which this category belongs: ■ Accounting ■ Administrative / Clerical ■ Brand Management ■ Business Development ■ Communication ■ Customer Service ■ Education ■ Engineering ■ Finance ■ Human Resources ■ Information Technology

Field	Description
	▪ Management ▪ Marketing ▪ Medical ▪ Organizational Skills ▪ Training ▪ Transportation
SKILL LEVEL	This is the proficiency of the skill: ▪ Beginner ▪ Intermediate ▪ Advanced ▪ Expert
SKILL USAGE	This is the number of years you have had this skill: ▪ 0-1 Years ▪ 2-3 Years ▪ 3-4 Year ▪ 4-5 Years ▪ 5-6 Years
SKILL LAST USED	This is the number of years since you have used this skill: ▪ 0-1 years ago ▪ 1-2 years ago ▪ 2-3 years ago ▪ 3-4 years ago ▪ 4-5 years ago ▪ 5-7 years ago ▪ 7-10 years ago
DATE ADDED	This is the date on which you added this skill to your profile.
DATE UPDATED	This the date on which you last made any changes to this skill
IS ENDORSED	**Yes** or **No** displays to indicate whether or not your manager has approved your skills in the Total Talent Profile.

Field	Description
ACTIONS	Click  to update the SKILL LEVEL, SKILL USAGE, or SKILL LAST USED.

Manually Add Competencies and Skills Via Total Talent Profile

Users with the appropriate permissions add Competencies and Skills directly from any Total Talent Profile they have rights to access.

The Manage Employee Competencies (**Administration » Global Settings » System Administration Features » Core » Manage Employee Competencies**) and/or Manage Employee Skills features (**Administration » Global Settings » System Administration Features » Core » Skills » Manage Employee Skills**) must be enabled for a user to perform these steps.

To add and manage Competencies from the Total Talent Profile:

1. Click **My Employees » My Employees**.
2. Locate the employee whose Skills and/or Competencies you want to manage and click the Actions menu .
3. Click **View TTP**.
4. In the Competencies and/or Skills table on the Overview tab, click the **Manage Competencies** or **Manage Skills** button.
   The Competencies or Skills Profile screen displays. Use the fields and options to manage competencies and/or skills.

   > **Note:** When a user other than the employee adds Skills and Competencies to an employee's Total Talent Profile, those skills and competencies are automatically approved.

Job History

The Job History section on the Total Talent Profile Overview tab lists positions that you have held.

What you see in this section depends on the modules that your company has licensed. If your company has licensed the Core HR module, the Internal Job History information does not display.

To view details of a previous internal job or an external job:

1. In the Internal Job History or External Job History section, click **View Details** in the job position row to see additional information about that position (to hide details click**Hide Details**.
   - For an external position, this may be an indication of whether the employee has granted permission to contact the previous employer.

- For an internal position, this may be information such as Hire Date, Start Date and Manager. Click **Add Feedback** to add a note regarding this position.

2. To view more details about an internal position, click the name of the position to view the Job Profile.
3. To edit details of an external position, click the **Edit** icon .
4. To delete the job, click the **Delete** icon .

Add Positions to the External Job History List

To add positions to the External Job History list:

Click **Add Position** to add a new position to your External Job History.

Manage Project Teams

The Project Teams section on the Total Talent Profile Overview tab shows the project teams associated with the employee, including milestones, team members, and project duration.

Managers create and maintain Project Teams in **My Employees** » **Project Teams**.
Only users with proper access rights can manage and edit Project Team details. Other employees can only view details.

To view and manage project team details on the Total Talent Profile Overview tab:

1. Click the **View Details** link to see the team members and any milestones that the team has achieved.
2. To manage or edit details about the team, click the team name to open the Project Teams screen.

Send Message to Project Team Members

The Project Team section on the Total Talent Profile Overview tab, allows Project Team creators to send an email containing project details to Project Team members.

To send project team details:

If you created the project team, click to send an email to all members of the team.
The email is sent using your default email application.

View Succession Plans

The Succession Plans section of the Total Talent Profile Overview tab is divided into four sub sections, which display information about positions for which the employee is a potential successor, potential successors for the employee's current position, succession plans in which the employee is a participant, and for managers, the risk of loss for their direct report.

Section	Description
Succession Plans on Which the Employee Sits	These are the succession plans in which you are a potential successor for another position in the company.
Potential Successors	This section lists those employees who would be a good fit for your position, if you were to be promoted or leave the company. Each employee name links to the employee's Total Talent Profile.
Succession Plans on Which the Employee Participates	These are the succession plans that you own or in which you participate.
Risk of Loss	This section displays only when a manager views the Total Talent Profile of an employee. The Risk of Loss section looks at various factors (active career paths, class attendance, performance, tenure, and so on), and calculates the chance (as a percentage) that the employee will leave the company.

Manage Training & Development

The Training & Development section on the Total Talent Profile Overview tab contains four parts: Development Plans, Past Development Plans, Training, and Education History.

Section	Description
Development Plans	Your manager creates your development plan for you. ▪ Click **Manage Development Plans** to view the details of development plans. ▪ Click to send notifications to your manager when your development plans change. ▪ Click **Show Details** to view plan items and their percentage completed. ▪ Click to update the percentage completed.
Past Development Plans	This section lists any development plans that you completed, including when the development plan started, the target completion date, and the percentage completed. Once a development plan is completed, it cannot be edited. ▪ Click **Manage Development Plans** to view the details of development plans. ▪ Click **Show Details** to view plan items and their percentage completed. ▪ Click to update the percentage completed.
Training	This section lists any classes that you are currently taking, any curriculum in which you are enrolled, and your percentage

Section	Description
	completion for that curriculum. Click the name of the class or curriculum to view details about it.
Education History	This section lists the degrees that you have earned. Information comes from two sources: ▪ If you were hired via Talent Management and entered education information as part of the application process. ▪ If you entered education history into Talent Management after you were hired.

Personal and Contact Details Tab

Depending on permissions, view and/or edit personal information, such as birth date, ethnicity, citizenship information and contact details for an employee.

Contents

Whether you see this tab, and the fields you see, depends on permissions granted by an administrator, and whether your organization uses the Core HR module. Core HR Administrators and those granted access via Self-Service Administration have access to Edit fields on this tab.

Personal Information:

Field	Description
Birth Date	This field displays your date of birth.
Ethnicity	This field displays your designated ethnicity.
Social Security Number	This field displays your Social Security number.
Gender	This field displays the gender with which you identify.
Disabled	This field displays an indicator of your disabled status (Yes/No).
National ID Country	This is the name of the country in which your national ID is tracked for purposes such as work, taxation, and benefits.
Marital Status	This field displays your marital status.
Subject to ADA	This field displays an indicator of your ADA protection status (Yes/No).
National Identifier	This field displays the unique identifier used by your National ID country for purposes of work, taxation, and benefits.

Contact Information:

Field	Description
Home Address	This field displays the employee's home address. Core HR Administrators with access to edit this field can click the **Mailing Address** option to mark the employee's home address and mailing address as the same.
Mailing Address	This field displays your mailing address, if it is different from your home address.
Personal Email	This field displays the personal email address of the employee.
Primary Emergency Contact	These fields display the name, relationship, and phone number for the employee's primary emergency contact.
Secondary Emergency Contact	These fields display the name, relationship, and phone number for the employee's secondary emergency contact.

Veteran Information:

Field	Description
Veteran Type	This field displays the type of veteran, such as Armed Forces Service Medal Veteran or Disabled Veteran.
Veteran Status	This Yes/No field indicates whether or not the employee is a Veteran.
Separation Date	This field displays the date on which the employee's military service ended.

Citizenship Information:

Field	Description
Citizenship Status	This field displays the employee's citizenship status, such as Citizen or Non-Citizen.
I-9 Verification	This field indicates the status of I-9 information.
Citizenship Identification Number	This is an identification number used to track any additional citizenship identification/registration number that must be tracked.

Passport Information:

Field	Description
Passport Issuing Country	This field displays the country that issued the employee's passport.
Passport Number	This field displays the employee's passport number.

Field	Description
Passport Expiration Date	This field displays the date on which the passport expired.

Employment Details Tab

Depending on permissions, and If the Core HR module is in use, view employee details related to the job, including Organization name, compensation information, and hiring and termination information.

Contents

Whether or not you see this tab depends on permissions granted by an administrator, and whether your organization uses the Core HR module. Core HR Administrators and those granted access via Self-Service administration will see an Edit icon next to fields they can edit.

Some fields have effective dating functionality that allows you to view history. Click the History icon to view history data such as the old and new values and the reason for the change.

Professional Information

Field	Description
Your Organization	This field displays the organization to which the selected employee is assigned.
Job Type	This field displays the job type, such as Full-time or Contract.
Hours/Day	This field displays the hours per day that the employee works.
Projected Time to Retire	This field shows the number of years remaining until the employee retires.

Job Information

Field	Description
Career Level	This is an indicator of the job level, such as Manager or Experienced (Non-Manager). If the employee has direct reports, a direct report icon displays, which you can click to see the list of direct reports. When a job seeker is hired through the Talent Management Recruiting module, Talent Management pulls the Career Level value from the requisition to the Total Talent Profile.
Exemption Type	This field displays the employee's tax exempt status, such as Exempt or Non-Exempt. When a requisition is created, Talent Management pulls the Exemption Type value from the Job Profile.
SOC Code	This field displays the employee's Standard Occupational Classification code.

Field	Description
Employee Class	This designates the group to which the employee belongs, based on classifications defined by an administrator to coincide with an organization's benefit packages.

Compensation

Field	Description
Annual Pay Rate	This field displays the employee's current salary.
Pay Frequency	This field displays the employee's payment schedule.
Work Schedule	This field displays the employee's work schedule. Full Time and Part Time options are default. Administrators can add additional values on the Drop-down and Multi-Select Lists screen for Work Schedule.
Payroll ID	This field displays a unique identifier for the employee, used for payroll purposes.

Hire Information

Field	Description
Original Date of Hire	This field displays the date on which the employee was first hired to work for your organization.
Rehire Date	If the employee left or was terminated after their original hire date, this field displays the date on which the employee was most recently hired to work for your organization again. If an Edit icon displays, click the icon to display the Rehire Date dialog, where administrators can update job related information, such as Rehire Date, Job Title, Annual Rate, Email/contact info, Manager, and more.
Seniority Date	This field displays an indicator of the employee's tenure with the company.

Termination Information

Field	Description
Termination Date	This field displays the date on which the employee was terminated or on which the termination is scheduled to occur.
Last Day Worked	This field displays the date of the last day on which the employee worked.
Separation Reason	This field displays the reason for the employee's termination, such as Attendance or Poor Performance.
Last Day Paid	This field displays the date on which the employee's last payment was sent to the employee.

Field	Description
Separation Type	This field displays the category of termination, such as Voluntary, Involuntary, or Retirement.
Exit Interviewer	This field displays the name of the employee who conducted the employee's exit interview.
Re-Hire Eligibility	This field indicates whether the individual is eligible for rehire if they apply for a job in the future. The default selections are Yes, No, and Conditional, but other options may display, depending on configuration.
Comments	This field displays comments entered in the Termination Date Dialog field, if the **Termination date** field has been edited.
Send Notification of Career Center Login	If the **Termination date** has been edited, this option (set in the Termination Date dialog box), indicates that a notification will be sent to the terminated employee, on the date of termination.

Additional Information Tab

Depending on if the Core HR module is in use, and if the Total Talent Profile **Additional Information** feature is enabled for your group, this tab will display custom field information configured by a Core HR Administrator.

About the Additional Information Tab

- You can see this tab if your organization uses the Core HR module, and if the Total Talent Profile **Additional Information** feature is enabled for your group.
- The Additional Information feature is found in the Core HR section on the Features screen (**Administration » Global Settings » System Administration » Features » Core HR » Total Talent Profile » Additional Information**)
- To customize the fields on this tab, a group must have the **Additional Information Configuration** option enabled. After this sub-feature is enabled for a group, members access configuration options on the Additional Information Tab Configuration screen (**Administration » Core HR » Additional Information Tab**).
- Managers and Employees granted Edit access via Self-Service Administration can edit fields on the Additional Information tab.

Benefits Tab

Depending on permissions and how the job offer for this employee was issued, the Benefits tab displays the benefits for the selected employee (as defined in **Offer issued for his/her current position**).

This tab displays if the Benefits module is enabled for your organization during implementation (**Administration** » **Global Settings** » **System Administration** » **Features** » **Core** » **Total Talent Profile** » **Benefits tab**), and if the selected employee's job offer was issued via Deltek Talent Management.

An administrator must also configure the ability for each individual benefit to be added to the Benefits tab (**Administration** » **Global Settings** » **System Administration** » **Features** » **Core** » **Benefits** » **Show in Total Talent Profile**). Once this feature is enabled, a Benefits administrator can access Benefits Administration (**Administration** » **Recruiting** » **Benefits**) and check the **Show in Total Talent Profile** option for each of the benefits to be displayed.

Due to the size of the tab, only 12 benefits display at one time. Click **View All Benefits** to see the complete list.

Preferences Tab

If the Preferences tab is enabled for you, you can edit your own relocation preferences and view other employees' preferences.

Relocation

Field	Description
Willing to relocate	This Yes/No field indicates whether or not the selected employee is willing to relocate.
Date Available	This field displays the date on which the employee is willing to relocate. If the employee is not willing to relocate, **N/A** is displayed.
Availability Comments	This field displays any additional notes about relocating.
Location Preference	This field displays the office location to which the employee is willing to relocate. If the employee is not willing to relocate, **None** is displayed.

Relocation Options

Field	Description
International	If the employee has indicated that they are willing to relocate internationally, this field lists the countries they selected. If the employee is not willing to relocate internationally, **None** is displayed.
Domestic	If the employee has indicated that they are willing to relocate to a domestic location, this field lists they countries they selected. If the employee is not willing to relocate to a domestic location, **None** is displayed.
Additional Relocation Comments	This field displays any comments regarding the employee's relocation.

Position

Field	Description
Job Function	This field displays the type of position, such as Customer Service or Engineering.
Type	This field displays the type of schedule that the employee wants, such as Full-time, Part-time, Contract, or Internship.
Travel	This field indicates the percentage of working time that the employee is willing to travel.
Additional Considerations	This field displays comments about any special arrangements that may be needed.
Edit	To edit relocation preferences, select **Edit** from the Actions menu.

History Tab

If the Core HR module is licensed, Core HR Administrators can view history of changes made on the Employee Summary pane, Employment details tab, and Personal & Contact Details tabs.

Contents

Once you specify the attribute, data on this tab is not editable. However, you can export the data by clicking the **Download as XLS** button.

Field	Description
Attribute Drop-Down	Select an attribute to limit history results to only information related to the selected attribute.
Attribute	Specify the name of the field or attribute for which you want to display history in the table. Select the **Employee Information** option to view changes made to all Effective Dated fields.
Previous Value	This field displays the value assigned to this field prior to the change, such as Engineer.
New Value	This field displays the value selected for the field when the change was made, such as Senior Engineer.
Effective Date	This field displays the date on which the change goes into effect. This field is blank for fields that are not Effective Dated.
Reason	This field displays the reason for the change, such as Promotion. This field is blank for fields that are not Effective Dated.
Date of Change	This field displays the date on which the change was made. This may not be the same as the effective date. Effective dates can be entered as past or future dates.

Field	Description
User	This field displays the name of the employee who made the change.
Download as XLS	Click this button to download the history data as an XLS file so that you can view it in a spreadsheet application.

Self-Service Tab

The Self-Service tab shows changes rejected or those pending approval. This tab displays if the Core HR module is licensed and the Core HR administrator has granted Edit access to members of the Employee or Manager groups via Self-Service Administration.

Contents

Data on this tab is not editable. Information that displays depends on the role of the logged-in user. For an Employee, this tab displays changes that the employee has submitted for approval. For Managers, when they visit a direct report's profile, this tab displays changes the manager submitted on behalf of the employee that are awaiting approval or that have been rejected. The Manager will not see changes that the employee made to their own profile. For Core HR Administrators, this tab displays all changes that employees and managers have submitted for approval.

Field	Description
Employee	This field displays the name of the employee who submitted the change. This field displays for Managers when viewing an employee's profile.
Previous Value	This field displays the value assigned to this field prior to the change, such as Engineer.
New Value	This field displays the value specified for the field when the change was made, such as Senior Engineer.
Effective	This field displays the date on which the change goes into effect. This field is blank for fields that are not Effective Dated.
Reason	This field displays the reason for the change, such as Promotion. This field is blank for fields that are not Effective Dated.
Date of Change	This field displays the date on which the change was made. This may not be the same as the effective date. Effective dates can be entered as past or future dates.
Employee	This field displays the name of the employee who submitted the change. This field displays for Managers when viewing an employee's profile.
Status	This field displays the status of the change.

Notifications

This screen lists the notifications sent to you.

Display the Notifications Screen

You can toggle between viewing all the notifications sent to you and viewing only those notifications that you have acknowledged.

To display the Notification screen:

Click **View Acknowledged Notifications / View All Notifications** to toggle between the two views.

You set the method of notification using the **Communication Delivery** option on the Your Account, Personalization menu. Valid options are email, RSS feed, or text message.

Contents of the Notification Screen

In addition to reviewing the contents of notifications that you receive, you can acknowledge, resend, or delete notifications.

Contents

Field	Description
Check box	Click one or more check boxes to select the accompanying notification lines to resend, acknowledge, or delete. Then click the **Resend Notification**, **Acknowledge**, or **Delete** buttons at the bottom of the screen.
Sent	This field displays the date on which the notification was sent.
Subject	This is the subject line from the notification email. Click it to see the entire email. You can also Resend Notification, Acknowledge, or Delete from this detailed email page.
Event	This is the event for the notification.
Actions	Click one of the following for the selected notification line: ▪ Click to resend the notification to your email. ▪ Click to signify that you received the notification. ▪ Click to delete the notification completely.

Correspondence Screen

This screen lists all of the letters that you have sent to, and received from, the Applicant Tracking module.

Display the Correspondence Screen

You display the Correspondence screen from the main navigation pane.

To display the Correspondence screen:

1. Click **Correspondence**.
2. Click **View Sent Letters** to see letters that you have sent or click **View Received Letters** to see letters that you received.
   You can toggle between these two options.
3. To display search criteria fields that you can use to filter the list of letters displayed, click **Show/Hide Filters**.
4. To see letters that you have archived, click **More Options** » **View Archived Letters**.
5. To archive letters, select one or more letters to archive and click **Archive** on the bottom of the screen.

Personalization Screen

Use this screen to configure settings that suit the way that you work in Deltek Talent Management.

Update Personalization Settings

You can update personalization settings at any time.

To update your personalization settings:

1. Click **Personalization** to display the Personalize System Settings screen.
2. Update your settings and then click **Submit**.
   Your changes are effective immediately.

Settings on the Personalization Screen

Set and manage personalization settings, such as calendar sharing and preferred language.

Calendar

Setting	Purpose
Share Calendar	Select **Yes** or **No** to denote whether or not users can view your calendar when they want to share an event with you or add you to an event. For this setting to work, the administrator must enable the **Shared Calendar** option in **Administration** » **Features** (Global Settings, System Administration).

Setting	Purpose
	If the setting is not enabled, the **Share Calendar** option does not appear in Personalization (Personalize System Settings).
Calendar Reminders	Select the default delivery method for your calendar reminders: no reminder, an email reminder, or a pop-up message that displays when you log in. You can change this setting when you create a calendar reminder.
Date Format	Select the format of dates in the Talent Management Suite: day first (31/12/2022) or month first (12/31/2022).
Name of Time Zone	Select your preferred time zone. If you live in one time zone but work in another, you can choose which time zone is used for all time sensitive information.
Time Format Setting Name	Select whether times display in 12-hour format (1:30 PM) or 24-hour format (13:30).

General

Setting	Purpose
Default Pagination Range	Select the number of results displayed in a table whenever a table is used to show details 10, 25, 50, or 100.
Distance Unit	Select whether distances are shown in miles or kilometers.
Preferred Language	Select the language in which the Talent Management user interface is displayed. Only those languages that have been installed by the Site Administrator will display as options.
Résumé Agents: Email Format	Select the format in which you receive e-mail notifications with results from the résumé search agent: in HTML or plain text. This setting displays only if your company uses the Applicant Tracking System.
Résumé Agents: Expiration	Select the number of calendar days after which a résumé search agent will no longer send results: 7, 14, 21, or 28 days. This setting displays only if your company uses the Applicant Tracking System.

Communication Delivery

This screen allows you to configure the manner in which you want notifications delivered.

This screen lists the different types of notification formats that you can use. Select the format that you want to use for each category or area of Talent Management, such as Calendar or Jobs).

Delivery Method	Definition
E-MAIL	Select to receive notifications as email messages. This is the default method.
RSS	Select to receive notifications as RSS feeds. With this method, users receive notifications via a regular feed that they can access using news aggregator software, as opposed to signing up for a mailing list or visiting the web site daily. Once an RSS feed is selected for a notification, the icon to view the RSS feed ( ) is enabled.
TXT/SMS DELIVERY	Select to receive notifications as text messages. This option is available only if your company uses the SMS (TXT) notification feature. If you select this option, make sure that your mobile phone number is entered in your profile.

Account Information

Select this option to view or edit your personal information or information about your account.

Employee Information

When you select the **Account Information** option, Employee information displays. Scroll to view all employee, position, and professional information, or click at the Employee Information and Professional Information section headings to edit that corresponding data.

Position information is display-only.

Diversity Information

Use this screen to enter or update your diversity information. Diversity information can be entered at different times: when the job seeker applies to a job, when the administrator creates a user account for the job seeker, when the new hire is onboarded, or just from this screen.

Completing this screen is optional.

Change Username/Password

Use this screen to change the username or password that you currently have set up for logging in to Talent Management.

More Options

Use this screen to set up two-factor authentication and add an extra layer of security to your account.

Edit Account Information

Edit your account information at any time to keep your personal account information up-to-date.

To edit employee information:

1. Click on the Employee Information heading of the Account Information screen.
2. Enter or edit any of the displayed fields, detailed as follows.

   Employee Information

   - **First Name**: Enter your first name.
   - **Middle Name**: Enter your middle name or initial.
   - **Last Name**: Enter your last name.
   - **Employee ID**: Enter your company identification number.
   - **Address One**: Enter the first line of your home address.
   - **Address Two**: Enter the second line of your home address, if any.
   - **Address Three**: Enter the third line of your home address, if any.
   - **Country**: Select the country in which you live from the drop-down provided.
   - **ST/PR**: Enter the state or province in which you live.
   - **Zip/Postal Code**: Enter your zip code or Click Select Zip/Postal Code to select available zip codes for the city/state entered.
   - **Date of Birth**: Select or enter (in MM/DD/YYYY format) your date of birth.
   - **SSN**: Enter your Social Security number, with or without dashes.
   - **Phone Numbers**: Enter any pertinent phone numbers. Enter the number and then in the next field select the type of number (such as Home, Pager, and Fax). Click **+** to add another number. Numbers previously added are displayed.
   - **Preferred Method of Communication**: Select your preferred method of communication: **E-mail** or **TXT Message**.
   - **Mobile Phone Number**: Select the country code for this cell phone, then enter the phone number including the area code.
   - **E-mail**: Enter your email address. Then enter it again in the **Confirm E-mail** field.
   - **About Me**: Enter any brief information you'd like attached to your employee record.
   - **Projected Time to Retire**: This is the number of years until your retirement, based upon your date of birth.
   - **Mentor**: **Yes** or **No** displays to denote whether or not you have agreed to mentor another employee.

     Click **Change** to change your response. The prompt "Do you wish to be a mentor?" displays. Select **Yes** or **No,** then click **Submit**.

- **Change Password**: Click **Change Username/Password** to update either your user name or password. See the next section for details.

Position Information (Display-only)

- **Organizational Unit**: This is the company and department in which you work.
- **Location**: This is the office location where you work.
- **Hire Date**: This is the date on which you were hired.
- **Status**: This is your tax exempt status.
- **Manager**: This is the name of your current manager.
- **HR Business Partner**: This is the name of your Human Resources contact.
- **Current Position**: This is your current title at this company.
- **Job Start Date**: This is the date on which you started your job.
- **Salary Grade**: This is the grade level for this job that is used in determining salary ranges.

3. Click **Save**.

Edit Professional Information

You can edit your certifications, professional associations, extracurricular activities, and languages that you speak.

To edit professional information:

1. Click on the Professional Information heading of the Account Information screen.
2. Enter or edit values for any of the displayed fields:
   - **Certifications**: Click **+** to add a new certification, or edit or delete existing certifications.
   - **Professional Associations**: Click **+** to add a new professional association, or edit or delete existing associations.
   - **Extracurricular Activities**: Enter any outside of work activities.
   - **Language(s) Spoken**: Enter any additional languages that you speak.

Enter Diversity Information

You can enter diversity information about yourself, such as your status as a military veteran. Completing this screen is optional.

To enter or edit your diversity information:

1. Click **Account Information** » **Diversity Information**.
2. Enter or edit any of the displayed fields, detailed as follows.
   - **Gender**: Select your gender from the drop-down list.

- **Race**: Select your race from the drop-down list.
- **Voluntary Self-Identification of Veteran Status: Protected Veteran Status**: Specify whether or not you are a protected veteran. You can also decline to specify yes or no.
- **Voluntary Self-Identification of Disability: Please select one of the options**: Specify whether or not you have a disability. You can also decline to specify yes or no.

3. Click **Submit** to save this information.

Change Your Username

You are identified by your username throughout Talent Management.

To change your username:

1. Click **Account Information** » **Change Username/Password**.
2. In the **Enter New Username** field, enter a new username.
3. Enter your current password.
4. Click **Submit**.

Change Your Password

You use your password to access your account regularly, so it is important to use a secure password that you won't easily forget.

To change your password:

1. Click **Account Information** » **Change Username/Password**.
2. In the **Enter New Password** field, enter a new password.
   Passwords must be:
   - At least eight characters long
   - A mix of uppercase and lowercase letters
3. In the **Verify New Password** field, enter the password again to confirm it.
4. Click **Submit**.

Enable Two-Factor Authentication

Use the More Options screen to set up two-factor authentication and add an extra layer of security to your account.

Warning: The following steps assume that you have already downloaded Google Authenticator or Duo Mobile on your mobile device.

To enable two-factor authentication:

1. Click **More Options** » **Setup 2FA**.
2. Scan the barcode using your mobile phone's authenticator app.
3. In the **Code** field, enter the 6-digit code generated from your authenticator app and then click **Submit**.

Disable Two-Factor Authentication

Use the More Options screen to disable two-factor authentication.

To disable two-factor authentication:

1. Click **More Options** » **Disable** » **2FA**.
2. Enter your username and password and then click **Submit**.

Org Chart

The Org Chart provides a graphical view of your position in the organizational structure.

If you have no direct reports: You see only your own badge. By default, your badge shows your name, job title, hire date, the location where you work, and the profile photo that you uploaded via your Total Talent Profile. The Site Administrator can configure the badge to show more information, or different information. The contents of the badge also depend on the Talent Management modules that your company uses.

If you have direct reports: Your badge appears at the top of a chart with your direct reports below. If a direct report has direct reports of their own, click to drill down to view information for those employees. Click to drill up again.

Displaying Successors

Display successors selected for a key position. The icon and Domino List display only if your company has implemented the Career Development and Succession Planning module.

To display successors:

Click to display the Domino List of potential successors and information about each one.

The information displayed includes: name, job title, current salary, the date on which the employee started in the current position, potential ranking, and risk of loss.

My Employees

Managers use options on the My Employees menu to create and update appraisals, career paths, development plans, training, and pending approvals.

My Employees Screen

Manage and assign information for direct reports to ensure they have what they need to meet personal goals and organization goals. Options available might include appraisals, career path information, development plans, training courses, continuous feedback sessions, and employee goals.

The options available on this page depend on the modules used by your Organization. For example, if your firm uses the Performance module, the Performance Page displays by default.

Page	Use to manage
Performance	Appraisals, continuous feedback sessions, and employee goals
Development	Career paths, development plans, and succession plans
Learning	Employee training courses

My Employees Performance Screen

Use this screen to manage appraisals, continuous feedback sessions, and employee goals for your direct reports.

Display the My Employees Performance Screen

Open the screen by clicking the **Performance** link on the My Employees screen.

To display the My Employees Performance Screen:

1. Click **My Employees** » **My Employees** on the main menu.
   The Performance Screen displays by default. If your organization uses the Learning or Development module, options to access these screens are displayed at the upper right.
2. To return to the Performance screen after clicking to another My Employee screen, click **Performance** at the top right of the My Employees screen.

Contents of the My Employees Performance Screen

Use fields and options to view an overview of information related to appraisals, and to manage appraisals, continuous feedback sessions, employee goals for direct reports, Total Talent Profile options, and ratings for performance and potential.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge contains a photo and, beneath that, key performance information such as the employee name, job title, and performance score. An up arrow, down arrow, or equal sign icon indicates whether the performance score has improved, declined, or stayed the same from the prior year's appraisal. The Ribbon area to the right of the photo contains a snapshot of, and links to, active appraisals. Click an appraisal name to manage its details. Click the **Expand** link to view the Current Appraisal, Pending Appraisals, and Past Appraisals sections.
Current Appraisal	This section lists a clickable link to the current appraisal as well as the appraisal score. In some cases you can click the next step in the appraisal process to move the appraisal to that next step. Options available from the Actions menu are **Print Appraisal** and **Reassign**.
Pending Appraisal	This section lists appraisals waiting on an action, such as scoring or signing.
Past Appraisal	This section lists appraisals that have been completed in the past. View Scoring details, such as Overall Scale Score, Raw Scale Score, and Raw Percentage Score. Actions available in this section are View Appraisal and Print (closed) appraisal.
Actions	You perform the following actions from the Actions menu. The actions listed depend on configuration, user permissions, and placement of employees on the org chart. ▪ **Continuous Feedback**: Click to open the Continuous Feedback screen, where you can view and create continuous feedback sessions for direct reports. ▪ **Goals**: Click to manage employee goals created outside the appraisal process, such as editing, changing status, retiring, and deleting. ▪ **Create New Appraisal**: Click to select options to launch an appraisal for the employee. ▪ **Create New 360 Assessment**: Click to select options to launch a 360 Assessment. ▪ **Drill down**: Click to view employee profiles for the direct reports of the current employee. Click the Up arrow to return to the original employee.

Field	Description
	▪ **View TTP** (Total Talent Profile): Click to display the Total Talent Profile screen. ▪ **Set Performance/Potential Rating**: Click to open the Set Performance/ Potential Rating dialog box, where you can edit the Potential scale, set a manual Performance score, select the next step for the employee on their path, such as a lateral move or a promotion, and specify the risk of loss as low, medium, or high. The rating options available in the **Performance Score** column of the Set Performance/Potential Rating dialog box are determined by the scale selected by an Administrator as the System Overall Scale. An Administrator sets this option on the Scales screen (**Administration** » **Global Settings** » **Your Organization** » **Scales**).

My Employees Development Screen

Use this screen to manage career paths, development plans, 9 box job performance details, and succession plan nominations.

Display the My Employees Development Screen

Open the screen by clicking the **Development** link on the My Employees screen.

Your organization must license and enable the Development module to use this screen.

To display the My Employees Development Screen:

1. Click **My Employees** » **My Employees** on the main menu.
2. Click **Development** at the upper right of the screen.

Contents of the My Employees Development Screen

Use these fields and options to view an overview of development plans, and to access screens where you can manage career paths, development plants, 9 box job performance details, succession plan nominations, Total Talent Profile options, and performance/potential ratings.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge contains a photo and, beneath that, key career development information, such as the employee name, job title, time in position, and hire date. The Ribbon area to the right of the photo contains a snapshot of, and links to, the active career path and development plans. A gold star marks the active career path. Click on a plan or path name to manage details. Click the

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>Expand link to view and manage current Career Paths and Development Plans.</td></tr>
<tr><td>Career Path</td><td>This section lists a clickable link to the current appraisal as well as the appraisal score. In some cases you can click the next step in the appraisal process to move the appraisal to that next step. Options available from the Actions menu are Print Appraisal and Reassign.</td></tr>
<tr><td>Development Plans</td><td>This section lists appraisals waiting on an action, such as scoring or signing.</td></tr>
<tr><td>Actions</td><td>You perform the following actions from the Actions menu. The actions listed depend on configuration, user permissions, and placement of employees on the org chart.

Add Career Path: Click to open the Create Career Path screen.
Add Development Plan: Click to open the Add Development Plan screen.
Drill Down: Click to view employee profiles for the direct reports of the current employee. Click the Up arrow to return to the original employee.
Nominate for Succession Plan: Click to open the Manager Nominated Successor screen, where a manager can specify the employee's readiness for a position and add comments.
View 9 Box: Click to view a graphical representation of a direct report's progress and growth using the metrics of potential ratings and performance score.
View TTP (Total Talent Profile): Click to display the Total Talent Profile screen.
Set Performance/Potential Rating: Click to open the Set Performance/Potential Rating dialog box, where you can edit the Potential scale, set a manual Performance score, select the next step for the employee on their path, such as a lateral move or a promotion, and specify the risk of loss as low, medium, or high.
The rating options available in the Performance Score column of the Set Performance/Potential Rating dialog box are determined by the scale selected by an Administrator as the System Overall Scale. An Administrator sets this option on the Scales screen (Administration » Global Settings » Your Organization » Scales).
</td></tr>
</table>

My Employees Learning Screen

Use this screen to manage all employee training, including classes in which employees are enrolled, and progress through a curriculum. Managers can also approve or reject enrollment requests from this screen.

Display the My Employees Learning Screen

Open the screen by clicking the **Learning** link on the My Employees screen.

Your organization must license and enable the Learning module to use this screen.

To display the My Employees Learning Screen:

1. Click **My Employees** » **My Employees** on the main menu.
2. Click **Learning** at the upper right of the screen.

Contents of the My Employees Learning Screen

Use the fields and options to manage all employee training, including classes in which employees are enrolled and progress through a curriculum.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge on the Learning screen contains a photo and, beneath that, data related to the employee's learning profile, such as the employee name, job title, and training credits earned. Click the name to open the Total Talent Profile or click the job to view the Position Profile Screen. The Ribbon area to the right of the photo contains a snapshot of, and links to, currently enrolled courses and curriculums. Click a course or curriculum name to view details. Click the **Expand** link to view Approvals, Current Courses, Recommended Courses, Courses to watch for the future, and a list of courses for which an employee has been wait-listed.
Approvals	This section lists enrollment requests that are pending approval. A color-coded number displays to alert managers to the existence of a request. Managers can approve or reject a learning request. The Manager and employee receive notification requests when approvals are pending. Managers can click the course name to view details.
Current Courses	This section lists courses in which the direct report is currently enrolled. Click the class name to view details. Click the **Attendance** link to view attendance details.
Recommended Courses	This section lists courses recommended for this direct report. To delete a course, click the delete icon in the row for that course. A manager can

Field	Description
	remove a course from the list for a direct report even if the course is marked as required.
Course Watch List	This section lists courses that might benefit the employee at a later date.
Class Waiting List	This section lists the courses for which the employee has been placed on a waiting list. The number indicates the employee's place in the waiting list. Click a link to view course details.
Actions	Perform the following actions from the Actions menu. The actions listed depend on configuration, user permissions, and placement of employees on the org chart. ▪ Drill down ▪ Learning Profile ▪ View External Training ▪ Tuition Assistance ▪ View TTP (Total Talent Profile)

Employee Job Profile Screen

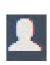
On this screen, you view details of an employee's position, such as salary information, status, and competencies.

Display the Employee Job Profile Screen

Access the employee Job Profile Screen by clicking a Job Title anywhere in Talent Management.

These instructions provide access via the Total Talent Profile, where all employees can access their own Job Profile details. However, depending on permissions, you can access other employee job profile details by clicking a job title on any screen where one displays.

To display your employee job profile on the Total Talent Profile:

1. Click the Your Account  icon.
2. Click **Total Talent Profile**.
3. In the Employee Summary pane under the photo, click your Job Title.

Contents of the Employee Job Profile Screen

View details about your position or, depending on permissions, another employee's position. Details include the Job ID, the salary grade and range, and whether the job is full time or part time.

Contents

When you are finished reviewing job details, click **Return** to return to the screen on which you clicked the Job Title.

My Matrix Employees Screen

Matrix managers perform management functions such as launching appraisals for Matrix employees. These employees are not direct reports, but are still accountable to the Matrix manager, for example, in a dotted-line relationship.

Display the My Matrix Employees Screen

Access the screen from the My Employees menu.

To display the My Matrix Employees Screen:

Click **My Employees** » **My Matrix Employees** on the main menu.

Contents of the My Matrix Employees Screen

Use fields and options to manage appraisals and to launch screens to manage other actions, such as 360 assessments, goal creation, and appraisal creation for matrix employees.

Contents

Field	Description
Employee Badge and Ribbon	The Employee Badge contains a photo and, beneath that, key employee information such as the employee name, for each Matrix employee. The Ribbon area to the right of the photo contains a snapshot of, and links to, active appraisals. Click an appraisal name to manage details. Click the **Expand** link to view the Current Appraisal, Pending Appraisals, and Past Appraisals sections.
Current Appraisal	This section lists a clickable link to the current appraisal as well as the appraisal score. In some cases you can click the next step in the appraisal process to move the appraisal to that next step. Options available from the Actions menu are **Print Appraisal** and **Reassign**.
Pending Appraisal	This section lists appraisals waiting on an action, such as scoring or signing.

Field	Description
Past Appraisal	This section lists appraisals that have been completed in the past. View Scoring details, such as Overall Scale Score, Raw Scale Score, and Raw Percentage Score. Actions available in this section are View Appraisal and Print (closed) appraisal.
Actions	You perform the following actions from the Actions menu. The actions listed depend on configuration, user permissions, and placement of employees on the org chart. ▪ Goals ▪ Create New Appraisal ▪ Create New 360 Assessment ▪ Drill down ▪ View TTP (Total Talent Profile)

9 Box Screen

View and manage a graphical representation of a direct report's progress and growth using the metrics of potential ratings and performance score. In System Settings, an Administrator can configure the 9 box to track progress and growth using appraisal score data or manual score data.

Display the 9 Box Screen

Access the 9 Box Screen on the My Employees menu.

To display the 9 Box screen:

Click **My Employees** » **My Employees** » **9 Box** on the main menu.

Contents of the 9 Box Screen

View and manage a graphical representation of a direct report's progress and growth using the metrics of potential ratings and performance score.

Contents

The 9 Box offers you a quick view of where each of your employees falls in relation to **Potential** and **Performance**. The default view displays your direct reports. In System Settings, an Administrator can configure the 9 Box to track progress and growth using appraisal score data or manual score data. To select the sort order and modify the grid view, use the **Filter**. To print this screen, click the **Print** icon above the grid.

Field	Description
Filter	Options in this area include **Search Date**, **Sort**, **Filter By**, which allows you to view not only **Direct Reports**, but also **2nd Level Reports** (the

Field	Description
	direct reports of your employees), **3rd Level Reports** (the direct reports of the employees who report to your direct reports), and a **Cumulative** view, which shows employees at all levels when the 2nd or 3rd level is selected. You can also filter by **Attrition**, which allows you to determine whether employees lost to attrition for various reasons (voluntary, involuntary, or both) were high performers.
New Box	The employee is new and still developing basic skills in their responsibilities but demonstrates significant aptitude.
Ready/Watch Box	The employee is performing well and demonstrates the ability to advance in the foreseeable future.
Ready/Move Box	The employee performs at highest levels and possesses the abilities to step into a more advanced role.
Questionable Box	The employee should be performing at a higher level but shows signs of improvement.
Growing Performer Box	The employee is a contributor in place and shows potential for more responsibility.
Future Contributor Box	The employee performs at a high level and is developing the abilities required for advancement.
Transition Out Box	The employee is consistently not meeting targets and expectations. Recent development actions have not improved performance.
Standard Performer Box	The employee is performing adequately but shows little promise to warrant advancement.
Expert-in-Place Box	The employee is superb in their current position, but their performance would not translate to a position with more responsibility.
Unrated Box	Employee is unrated on either performance or potential. Select this box to identify any employee that may require an action, such as rating their potential or completing an assessment.
Actions	▪ **View 9 Box employee details**: Click the Display Employees from this Box in Detail View icon to view details on the View 9 Box Employee Details screen. This icon displays at the bottom of a box that contains employees. ▪ **View Performance and Potential Scores**: If an Administrator has enabled Aggregate view, when you hover over an employee name in the grid, the scores shown for the employees may reflect

Field	Description
	an average score from up to 3 dates specified by the Administrator. ▪ **Edit (Administrators Only)**: If you have the appropriate permissions, you can change labels and colors. Click **Edit**, click the **Edit this box** button for the box that you want to change, and then click **Update**.

My Project Teams Screen

Use the My Project Teams screen to view the teams that you created or to which you belong as a member. Managers create and manage project teams. Employees gain skills and competencies by serving on these teams as either team leads or team members.

Display the My Project Teams Screen

Access the My Project Teams screen from the Career Center menu or from the My Employees menu.

To display the My Project Teams Screen:

Select the appropriate action:

- To display the screen from the Career Center menu, click **Career Center** » **Career Development** » **Project Teams**.
- To display the screen from the My Employees menu, click **My Employees** » **My Employees** » **Project Teams**.

Contents of the My Project Teams Screen

Use the fields to review and manage details of your projects, and to perform actions such as starting and stopping a project and adding new team members.

Filter For Non-Administrators

You can filter the display of teams in the My Project Teams table. Click the Filter icon at the top of the screen to display a list of available filter parameters and then click the check box for each filter that you want to use. Results display in the projects table. To remove the filter, click the link beneath **Clear Filter**.

For team leads, team owners, and regular users, fields can include:

Field	Description
Keywords	Enter a term to use to narrow projects that are displayed in the list.
Include Closed Projects	Select this option to include closed projects in search results.

Filter for Administrators

For administrators, these search fields are available in addition to Keywords and Include Closed Projects.

Field	Description
Show only Projects that I'm a Member of	Select this option to narrow search results to only those projects for which you are a member.
Team Lead	As team lead, click **Select Employees** to find employees to add to the project. You can search by first name, last name, or email address. In the search results table, click the Plus icon to select the employee. Click **Confirm Selection** to add the selected employees to the project team. The selected employee names display under the Team Lead title.
Team Owner	As team owner, click **Select Employees** to find employees to add to the project. You can search by first name, last name, or email address. In the search results table, click the Plus icon to select the employee. Click **Confirm Selection** to add the selected employees to the project team. The selected employee names display under the Team Owner title.

Columns

The My Project Teams screen displays the following columns:

Field	Description
Project Name	This is the name of the project on which the team is working (for example, Employee Appreciation Event). Click the project name to display information about the project and its team members.
Project Code	This is a read-only, sortable, column that transfers from Costpoint to Talent Management. This provides additional information about a project to someone who is selecting projects before launching appraisals.
Description	This is a description of the purpose of the project.
Team Owner	This is the person with ultimate responsibility for the team.
Team Lead	This is the employee who was chosen to lead the team.
Duration	This is the planned start date and end date of the project.
Members	This is the number of members belonging to the team. Click the total to view a list of team members. Click an employee's name to view their Total Talent Profile, which lists the employee's skills and competencies.

Field	Description
Status	A project's status can be **Active** (in progress), **Pending**, or **Closed** (not yet started or already finished).

Start/Stop Project Action

The Start and Stop icons display in the second to last column on the My Project Teams screen. Use these icons to control the project's duration.

Field	Description
Start Project	Click this icon to start the project and change the project's **Status** to **Active**.
End Project	Click this icon to end the project. When you end the project, if Skills and Competencies are defined for the project, you can assign these metrics to team members. When you finish this evaluation, the project's **Status** changes to **Closed**.

Actions

The following actions are available in the last column from the vertical dot menu. The Edit, Add Project Team Members, and Delete actions display only for users with administrative privileges.

Field	Description
Edit	Click this icon to change the general information about the project team, including the name, description, team lead, and the skills and competencies that the team is expected to gain from participating in the project.
Add Project Team Members	Click this icon to search for and add team members.
Email All Team Members	Click this icon to open an email message in your default email program, addressed to all team members.
Delete	Click this icon to delete the entire project and team.

Certifications Screen

If your Organization uses the Learning module, you may have access to the Certifications screen on the My Employees menu, where you can view and manage Internal and External employee-earned certifications for your direct reports.

Display the Certifications Screen

If your organization uses the Learning module, you may have access to the Certifications screen on the My Employees menu.

To access the Certifications Screen:

Click **My Employees** » **My Employees** » **Certifications**.

Contents of the Certifications Screen

View internal and external certifications earned by your employees.

Contents

Field	Description
Employee Name	Below each employee name is a list of Internal and External certifications earned by that employee. Click an employee name to open that employee's full Learning Profile.
Internal Certifications	View a list of completed curriculums or courses within the Learning module, which issued a certificate upon completion.
External Certifications	View a list of external certifications, including details like the organization who issued the certification, and when the certification expires. Click the View icon to view attached files. Click the checkmark to mark this certification acknowledged. Click the circle with a diagonal line to mark the certification no acknowledged. Acknowledgment is simply a way to note this certification has been noted and recognized by the manager.

Profile Edits Screen

Approve or reject edits to an employee's profile.

Contents

Each time that one of your employees edits their profile, you are prompted to approve those edits before they appear in Talent Management.

- To approve an edit, select the **Approve** check box corresponding to the change.
- To reject an edit, select the **Reject** check box corresponding to the change.
- Click **Save** when you are finished.

My Pending Approvals Screen

View and manage approvals that are awaiting your attention, including those associated with appraisals, offers, requisitions, and changes made by your direct reports to their Total Talent Profile.

If You Reject an Appraisal

You can approve or reject an appraisal on this screen. If you reject an appraisal, it automatically moves back to the Assessment phase. When this happens, all appraisers must re-enter their appraisals and all signers must re-enter their signatures.

Display the My Pending Approvals Screen

You can display the My Pending Approvals screen from the Performance menu or from the My Employees menu.

To display the My Pending Approvals screen:

Select one of the following actions:

- On the Approval History or All Pending Approvals screen, click **Performance** » **Approvals** or click the **Pending Approvals** button.
- From the My Employees menu, click **My Employees** » **Approvals**.

Contents of the My Pending Approvals Screen

Depending on the modules that you are using, you can view and approve requisitions, offers, appraisals, and self-service items that direct reports have updated on their Total Talent Profiles.

Requisitions

Requisitions display if you are using the Recruiting module.

Field	Description
Division	This field displays the business unit to which the requisition belongs.
Job Code	This field displays the job code associated with the requisition.
Req #	This field displays the requisition number.
Requisition	Click the link to view details about the requisition.
Date Created	This field displays the date on which the requisition was created.
Recruiter	This field displays the name of the recruiter who manages the requisition.

Field	Description
HM	This field displays the name of the hiring manager.
Attachments	This field displays the number of documents attached to the requisition.
Members	This field displays the number of members connected to the requisition approval process, and lists each member's name.
Actions	Use this field to approve or reject the requisition and, depending on your privileges, to do the following: ▪ **Add/view Attachments**: Click this to view any attachments for the requisition. ▪ **Edit Requisition**: Click this to modify the requisition. ▪ **Add/View Notes & Transactions**: Click this to see other information related to the requisition.

Offers

Offers display if you are using the Recruiting module.

Field	Description
Candidate	Click the name of the individual being offered a position to view that candidate's résumé.
Offer Date	This field displays the date on which the offer was made official.
Division	This field displays the business unit offering employment.
Job Code	This field displays the job code that signifies the job being offered.
Req #	This field displays the requisition number.
Requisition	Click the link to view details about the requisition.
On behalf of	This field displays the name of the employee's manager.
Initiated by	This field displays the name of the individual who began the offer process.
Members	This field displays the number of members connected to the approval process, and lists each member's name.
Actions	Use this field to approve, reject, or view the offer.

Appraisals

Appraisals display if you are using the Performance module.

Field	Description
Division	This field displays the business unit to which the employee belongs.
Employee	This field displays the employee’s name. Click the name to display the employee’s Total Talent Profile.
Job Title	This field displays the name of the employee’s job.
Appraisal	This field displays the name of the appraisal (for example, Copywriter or Project Manager) that is being used to evaluate this employee.
System Calculated Rating	This field displays the Overall Rating, which is calculated based on the scores entered by the raters for all competencies, skills, and goals in the appraisal.
Manager Override Rating	Depending on your organization’s settings, a manager may be able to override the automatically calculated Overall Rating. The manager can then enter a different value on the Summary tab of the appraisal during the Review phase.
Manager	This field displays the name of the employee’s manager.
Members	This field displays the number of members connected to the approval process, and lists each member's name.
Actions	Use this field to approve or reject the appraisal.

Self-Service

The Self-Service section displays items that a direct report has edited in the Total Talent Profile, for Core HR Administrators using the Core HR module.

Field	Description
Employee	This field displays the name of the employee who made the change. Click the name to display the employee’s Total Talent Profile.
Attribute	This field displays the name of the field or attribute that was changed.
Previous Value	This field displays the value that was entered for the attribute prior to the change.
New Value	This field displays the change that the employee made to this attribute, which requires your approval.
Effective	This field displays the date on which the change will become effective.

Field	Description
Reason for change	This field displays the reason that the employee gave for the change.
User	This field displays the name of the employee's manager.
Members	This field displays the number of members connected to the approval process, and lists each member's name.
Actions	Use this field to approve or reject the changes to the Total Talent Profile fields.

Bulk Actions and Buttons

The following bulk actions and button actions are available on this screen.

Field	Description
Bulk Actions	Select each requisition, offer, and appraisal that you want to approve or reject and select the appropriate radio button: ▪ **Approve all selected**: Select each requisition, offer, appraisal, and self-service item that you want to approve and click this button to approve all of them at once. ▪ **Reject all selected**: Select each requisition, offer, appraisal, and self-service item that you want to reject and click this button to reject all of them at once.
View All Pending Approvals	Click this button to see a list of any approvals that are awaiting your attention, including those associated with appraisals. The screen also displays approvals associated with requisitions and offers.
Approval History	Click this button to display a list of all approvals in which you have participated.

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